CRAMER ROUNDTABLE SERIES

Structured Products

October 9, 2025 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Rhonda Kulhanek**
8:15am	**Structured Product Landscape: BD Insights** - Sales Trends - Increasing Adoption and Engagement - Structured Products as a Core Offering	**Vishal Desai –** Citi **Jeff Wall –** RBC **Staci Goins –** Truist
9:45am	**Structured Product Landscape: Issuer Insights** - The Story of 2025 - Market Dynamics and Diversification - Emerging Trends and Future Outlook	**Chris Ahn –** Bank of America **Ezgi Ertan –** JPMorgan
11:00am	**SMAs and ETFs** - Adoption and Next Steps - Build Your Own vs Third Party Management - UMA Integration and Platform Plumbing	**Dan Teague –** Diversify Advisor Network **Dennis Monohan –** Halo **Erwan Fesquet –** MassMutual
11:45am	**Lunch**	
12:55pm	**Evolution of the Secondary Market** - Today's Experience and Challenges - Moment's Role in the Current Ecosystem - Driving Growth and Innovation	**Mike D'Auria –** JPMorgan **Andrew Kuefler –** Moment
2:00pm	**Balancing Growth and Risk** - Proprietary Indices and QIS Parameters - Concentration Guidelines - Using Tech to Reduce Risk	**Chris Loudon –** Raymond James **Matt Sell –** U.S. Bancorp Investments
3:30pm	**Ask Anyone Anything**	**Open Forum**
4:00pm	**Closing Remarks**	**Todd Nixon**

***Times may shift based on group engagement.**